

MONTEREY PENINSULA UNIFIED SCHOOL DISTRICT**RESPONSES TO THE
2000 MONTEREY COUNTY CIVIL GRAND JURY REPORT****FINDINGS**

1. *A long period of economic independence for MPUSD encouraged an attitude of self-sufficiency. This resistance to accepting outside advice and new ideas resulted in missed opportunities for the District and its students.*

Response: We would agree with this finding.

2. *MPUSD's administration and Board were reluctant to face the District's new financial realities, yielding instead to public pressure to retain all popular classes, services, and activities. One-time funds were used to pay for ongoing programs, obscuring the need for budget cutbacks.*

Response: This finding is broad in its conclusions. There was some evidence that this occurred. The respondent would agree that public pressure influenced decisions.

3. *MPUSD did not make use of state and federal funds available for new construction and renovation of school buildings. Aging physical plants present safety hazards and other impediments to the teaching and learning environment.*

Response: The respondent could find some evidence that this was true. However, in 1999, the District received funding from the state in the amount of \$6.818 million to plan for major modernization and rehabilitation.

4. *The key financial planning responsibility of the District Superintendent, and the importance of a strong support staff to assist in making informed decisions, were not recognized.*

Response: We would agree with this finding. Processes have been put in place to prevent this from happening again.

5. *Board members did not receive adequate orientation and training as to their duties and responsibilities, particularly in the areas of budget preparation, monitoring, and long-range planning.*

Response: There were some efforts to orient Board members as to their roles in finance and planning. The efforts were insufficient. Processes are in place to keep Board members informed and involved in the total operation of the District.

6. *Morale among MPUSD teachers was allowed to deteriorate. Concerns of the teachers included low compensation, job insecurity, and lack of support from the District administration and Board.*

Response: This is true to a degree. The attitude of staff and the influence of employee organizations also contributed to this.

7. *Clear goals and objectives for the District were lacking, due in part to weak lines of communication between the District Superintendent's Office and the Board.*

Response: The respondent would tend to agree with this finding.

RECOMMENDATIONS

1. *Monterey Peninsula Unified School District (MPUSD) continue to modify its tradition of independent action in order to take full advantage of programs and services available through the Monterey County Office of Education (MCOE), state and federal agencies, and private organizations. This will expand and enrich the scope of options available to personnel and students in all of the District's schools.*

Response: The Monterey Peninsula Unified School District is now on-line with MCOE's Business Services software package, providing us with a more sophisticated financial system as well as a monitoring system. Communication is ongoing between the Superintendent and Chief Business Officer of MPUSD, MCOE's business office personnel, and Superintendent.

MPUSD is also utilizing services of graduate students from the Naval Postgraduate School who are participating in research related to enrollment, projections and the upcoming bond issue.

MPUSD has entered into discussions involving the exploration of grants and the development of a long-term strategic plan with the Monterey Community Foundation.

2. *MPUSD brings to completion its current software conversion program to allow full transition to MCOE's financial system and closer monitoring of budget compliance, student enrollment, and position control data. With more accurate data, the Budget Advisory Committee can continue to serve as an important link in the District's financial planning process, with representatives from the Board, teaching and classified staff, and administration participating.*

Response: The Monterey Peninsula Unified School District is in the process of converting to MCOE's new financial package, Standardized Account Code Structure (SACS). In addition, to ensure the accuracy of student data, the K-12 school sites are in the process of converting to SchoolMax, a newly purchased Student Information Management System. These new systems are expected to be fully functional by June 2001. MCOE is currently transitioning to the Tulare system, a human resource package; and as a result, it is probable that MPUSD will follow suit.

This position control software ties in nicely with MCOE's SACS package and should further allow MPUSD to draw on the expertise of MCOE's staff.

The Budget Advisory Committee, consisting of representatives from the Board, teaching and classified staff, and administrative personnel, will be collaborating with staff and advising in the development of the 2001-2002 budget.

3. *The role of the 7-11 District Advisory Committee be expanded to include assisting MPUSD administration in planning for school renovation projects and new construction. This additional function would include investigation of possible financial assistance sources, such as state or federal matching funds, as well as establishment of priorities.*

Response: Because of the decline in enrollment and because there is no indication of an increase in projections, it is not feasible to plan for additional facilities. However, the State Department has allocated planning funds for a modernization plan. Staff members, architects, and designers are currently devising this plan for the district. In addition, the Board of Education is in the process of planning a bond measure which, if passed, will raise the matching funds needed to complete the modernization.

Some members of the 7-11 committee will be invited to participate on the modernization committee to assist in the passage of the bond issue.

4. *The role of the District Superintendent be more clearly defined, and that he/she be supported in the discharge of financial planning responsibilities by creating a new post of Chief Deputy Administrator for data processing, risk management, and position control.*

Response: The Monterey Peninsula Unified School District has hired a new Chief Business Officer whose responsibilities include working with both the Office of Human Resources regarding position control and Maintenance Department related to risk management. MPUSD is in the process of merging the Data Processing Department into the Office of Technology. This merge should be completed by June 2001. The position of Director of Technology and Information Services is in the process of being created to oversee this department. The Chief Business Officer will coordinate with all departments listed above.

The role of Superintendent is being defined and refined as a result of the constant interaction between the Board and himself. The Superintendent is committed to a "hands on" approach and will provide leadership pertaining to the development of the district budget, site budgets, and collective bargaining.

5. *The orientation and training of Board members be carefully structured, with particular emphasis on budget preparation, monitoring budget compliance, and interpreting financial and management audit findings. Testing for comprehension and periodic review of key issues might be part of any training program.*

Response: The Board has directed the Superintendent and Chief Business Officer to present them with monthly updates regarding the status of the budget. In addition, each Board member has met with the Chief Business Officer and reviewed audits in depth. The Board will be participating in workshops with trainers from the California School Boards Association related to the roles and responsibilities of the School Board. The Chief Business Officer will provide on-going training related to budget development and audit processes.

6. *Representatives from the teaching staff be included in any review of MPUSD's goal and objectives, budget priorities, and curriculum decisions, with a careful analysis of all personnel requirements and salary schedules.*

Response: Collective bargaining guarantees the involvement of employee organizations in the matters of personnel and salary issues. In addition, the leadership of each employee organization participated in goal setting workshops earlier in the year. Our objective is that they will be involved in the aforementioned planning process which will give them an opportunity in establishing long- and short-term goals and objectives as well as becoming involved with curriculum and instruction. To insure involvement regarding curriculum decisions, the Associate Superintendent and Director of Special Programs assign specific curriculum-based tasks to all instructional personnel.

7. *Lines of communication be strengthened and carefully observed, with full involvement of all elements of the MPUSD community, from the District Superintendent's office to the Board to administrative, classified, and certificated staff representatives from each school in the District. This will allow for a unified approach and cooperation in achieving MPUSD's goals and objectives.*

Response: The Superintendent has begun strategies aimed to increase and enhance communication. The Cabinet, previously consisting of five staff members, has been expanded to include all directors and coordinators of each department. Furthermore, planning meetings with all administrators are conducted at least twice a month for the purpose of dealing with employee curriculum and budget issues. The Superintendent and his staff meet periodically with the leadership of each employee organization. In addition, the Board and Superintendent maintain a constant communication link including regular and special board meetings as well as personal one-to-one conferences.

The Monterey Peninsula Unified School District recently met with a public relations consultant who will perform a communications audit and will also provide recommendations, based on that audit, to the District.

3/5/01